

INDIANA
HomeTown Competitiveness Program

A Come-Back/Give Back Approach to Rural Community Building

SITE VISITATION
INFORMATION PACKET

PHASE I

PHASE I BACKGROUND INFORMATION SHEET

INTRODUCTION

The Indiana - HomeTown Competitiveness Program (Indiana-HTC) harnesses the power of RISE 2020 with the nationally recognized community development program entitled: “HomeTown Competitiveness”. Employing four of the seven RISE 2020 pillars, this program will help communities focus on:

- Mobilizing local leaders and building community civic capacity;
- Energizing local entrepreneurs to build a strong economy;
- Capturing wealth transfer to raise development dollars;
- Attracting young people to strengthen community demographics.

Why participate in the Indiana - HomeTown Competitiveness pilot program?

There are many reasons your community should consider the program:

- Since 2003 HTC has received national recognition and awards from organizations such as the National Rural Funders Collaborative, the International Community Development Society and the W.K. Kellogg Foundation.
- The Indiana - HomeTown Competitiveness program will:
 - a. Focus on the basics necessary for building and sustaining a robust development agenda. The program empowers more people for leadership and identifies more dollars to be mobilized in support of an aggressive community and economic development strategy; and
 - b. Provide a development framework that can help move rural communities forward.
- The opportunity to collaborate with a statewide “Indiana Resource Team” in order to create a customized strategic framework for your community. The core organizations coordinating the Indiana Resource Team include:
 - a. Ball State University’s “Building Better Communities”;
 - b. Indiana Grantmakers Alliance;
 - c. Indiana Office of Community and Rural Affairs;
 - d. Indiana Rural Development Council;
 - e. Purdue University’s Center for Regional Development/Extension Service; and
 - f. USDA - Rural Development.

The entire Indiana -HTC program consists of three major phases of work:

- PHASE I ASSESSMENT- Phase I (typically 4 months to complete) consists of the community exploring the HTC process, conducting local assessments of development history, context, issues and assets as well as creating customized strategic opportunities.
- PHASE II STRATEGIC DEVELOPMENT and IMPLEMENTATION - Phase II (typically 12 - 18 months to complete) takes the customized strategic opportunities created in the Phase I Assessment and creates a specific strategic action plan. Most communities will want to pursue Phase II if the Phase I Assessment proved successful. Phase II requires a larger mobilization of community effort that will include the identification of a local “site leader,” an overall Steering Committee and four Task Forces (Entrepreneurship, Leadership, Youth Engagement and Charitable Assets).
- PHASE III SUSTAINING SUCCESS - Phase III sustains the successes from Phase I and II moves all of the various strategies into action.

This Pilot Community Application packet only applies to PHASE I ASSESSMENT. After completing Phase I, pilot communities will have the opportunity to decide whether or not to implement Phase II and Phase III.

PHASE I ASSESSMENT OUTCOMES, DELIVERABLES & INVESTMENTS

Outcomes and Deliverables:

Communities chosen to participate in the Phase I Assessment can anticipate the following outcomes and deliverables:

- Overall each community will have the opportunity to explore the potential value of the Indiana - HTC development framework and determine if participating in the pilot is a good fit for their community.
- Community teams (consisting of 5 members) will have the opportunity to participate in a three day training in order to learn more about the Indiana - HTC process.
- Participating communities will receive a variety of technical assistance services from the six core organizations of the Indiana Resource Team. These TA services will also include an investment in resources from the Indiana Office of Community and Rural Affairs.
- Each pilot community will have the opportunity to host an Indiana - HTC “Kick-Off Celebration” that will launch the beginning of the assessment process.

- In collaboration with the Indiana Resource Team each community will:
 - a. Create a baseline community/economic development assessment with preliminary reviews of key community assets and strategies - including entrepreneurship as an economic development strategy, leadership engagement and development, youth engagement and attraction, and charitable assets as a resource mobilization strategy;
 - b. Develop a clear set of community/economic development recommendations for their consideration; and
 - c. Conduct an *Opportunity Retreat* in order to create and develop their customized strategic opportunities.

Phase I Assessment Investments:

What are the investments for the Phase I program and how will they be shared?

The Indiana - HTC program is not a grant program, but rather a collaborative effort between the Indiana Resource Team and the pilot communities. The total investment for the Phase I Assessment will be shared by both the Indiana Resource Team and each of the pilot communities. Overall the investment activities include:

<u>Activity</u>	<u>Investments</u>
• Information Seminar (July 17 th).....	\$15,000
Of which:	
a. Community Investment.....	\$0.00
b. Indiana Resource Team Investment.....	\$15,000
• 3 Day Training (Feb. 2008).....	\$36,000
Of which (assuming a maximum of 12 communities participating):	
a. Community Investment.....	\$500 (per 5 member team)
b. Indiana Resource Team Investment.....	\$30,000
• Phase I Assessment.....	\$209,000
Of which (assuming a maximum of 12 communities participating):	
a. Community Investment.....	\$7,000 (per community)
b. Indiana Resource Team Investment.....	\$125,000
• Total Project Investment.....	\$260,000
Of which (assuming a maximum of 12 communities participating):	
a. Community Investment.....	\$7,500 (per community)
b. Indiana Resource Team Investment.....	\$170,000

PHASE I ASSESSMENT PROCESS, TIMELINE & BENCHMARKS

Phase I Assessment Process:

The approach the Indiana Resource Team will utilize to engage communities in the application process would be best characterized as a “conversation”. This conversation will be designed to provide opportunities for both the Indiana Resource Team and communities to exchange ideas around the key principles associated with the Indiana - HomeTown Competitiveness program.

This conversational approach will consist of the following process, timeline and benchmarks:

- **July 17, 2007: Information Seminar** - On July 17th rural leaders attended a day-long information seminar to learn about the Indiana - HTC program. At the conclusion of the seminar, communities were invited to submit an “information request” form.
- **September 4, 2007: Pilot Community Application Packet** - On September 4 Pilot Community Applications were electronically sent out to those communities who participated in the July 17th seminar or who directly requested a packet from the Indiana Office of Community and Rural Affairs. Applications should be returned no later than 5:00 pm. on Thursday October 4, 2007.
- **Oct. - Dec. 2007: Pilot Community Site Visitations** - Between October and December the Indiana Resource Team will review the submitted applications with the goal of identifying potential communities for site visitations. **As a result of this application review, not all communities will receive a site visit.** During these visits, members of the Indiana Resource Team and community leaders will have an opportunity to continue the conversation about the program and its potential impact on the community.
- **February 19 - 22, 2008: Indiana - HTC Academy** - Following the site visitations, the Indiana Resource Team will invite 6 - 12 communities to participate in the Indiana - HTC Academy. Scheduled from Tuesday, February 19 (noon EST) - Friday, February 22 (noon EST) 2008, community teams (5 members per team) will be required to participate in this three day academy.
- **February 29, 2008: Pilot Communities Finalized** - The final conversation between the Indiana Resource Team and the communities will occur following the conclusion of the three day training. Communities will then have the opportunity to make a final decision regarding whether the Indiana - HomeTown Competitiveness program is a good fit for their community.
- **March 2008: Phase I Assessment Preparation** - During March the community will prepare for the Phase I Assessment. Activities will include the organization of a Community Steering Committee, local and support staff recruited, volunteered or assigned and the Indiana - HTC “*Kick-Off Celebration*”.

- **April 2008: Phase I Baseline Assessment Launched** - During the month of April the community will begin implementation of the Phase I Assessment activities. These activities will include: a baseline assessment starting with a data review, key interviews and focus groups. The focus groups will be facilitated with Indiana Resource Team members working in each of the four HTC pillars.
- **May 2008: Phase I Baseline Assessment Completed** - In May the community will complete the Phase I baseline assessment. Then utilizing the data collected, the community will develop a preliminary set of strategic recommendations.
- **June 2008: “Opportunity Retreat”** - Following their work in May, the community will conduct an “Opportunity Retreat” in order to begin formulating the community’s customized strategic opportunities as well as decide whether to move forward on the Phase II Strategic Development and Implementation.

POSITION DESCRIPTIONS & ORGANIZATIONAL STRUCTURE

Position descriptions have been developed in order to ensure a better understanding of the roles and responsibilities of all key participants, as well as, an organizational structure that will help in establishing a clear line of communication between the Indiana Resource Team and pilot community.

Indiana Resource Team Job Descriptions:

SITE COACH - The Site Coach represents the Indiana Resource Team and is a person that has experience in community development, has the knowledge needed to understand development, can teach what they know and can recruit others to do similar work. The Indiana Resource Team will be responsible for retaining and supervising this position.

The site coach has three primary job responsibilities:

1. Strategic Leader
2. Liaison with the Community
3. Day-to-Day Manager of Indiana Resource Team Engagement

1. Strategic Leader - The Site Coach serves as the strategic leader for the Indiana Resource Team engaged in a pilot community. The Site Coach carries out the execution of the contract. As strategic leaders, the Site Coach plays a number of roles, including:

- Assembling the Indiana Resource Team to work in the pilot community;
- Ensuring the Indiana - HTC process flows;
- Monitoring the pacing of the Indiana - HTC process and celebration;
- Identification of strategic opportunities, leverage points and catalytic activities;
- Assumes overall responsibility for tracking, planning and triggering technical support for the Indiana Resource pillar teams;

- Maintain a mentoring relationship with the community coordinator and the community teams (steering committee and task forces).
2. Liaison - The Site Coach serves as the liaison between the Indiana Resource Team and the pilot community. As the liaison, the Site Coach plays a number of roles including:
- Clarifying expectations;
 - Ensuring good communication;
 - Managing quality control;
 - Trouble shooting problems;
 - Strategizing media relations;
 - Engaging in most steering committee calls and in task force calls as needed.
3. Day-to-Day Manager - The Site Coach serves as the day-to-day manager for the Indiana - HTC process and services in the pilot community. As the day-to-day manager, the Site Coach plays a number of roles, including:
- Regular communication with the Community Coordinator and Steering Committee;
 - Facilitation/coordination of the Indiana Resource Team and its community engagement;
 - Day-to-day oversight of the Indiana - HTC process elements including the coordination and development of action plans, performance reports and process deliverables.

PILLAR SPECIALISTS - A Pillar Specialist is a member of the Indiana Resource Team assigned to oversee a specific pillar task force in a pilot community. The Indiana Resource Team and the Site Coach will be responsible for securing the pillar specialists for each pilot community. These pillar specialists have the following primary job responsibilities:

1. Provide pillar expertise and engage in task force meetings/calls as needed;
2. Support the pillar task force;
3. Be a strong team player.

1. Pillar Expertise - These individuals have the knowledge and expertise in the particular pillar they are assigned to facilitate in the pilot community. These pillar specialists help the pilot community address challenges, explore options, and support the community in building strategy and capacity.

2. Pillar Task Force - HTC is all about people who are enabled to do remarkable things. A central job for team members is to coach, mentor and facilitate their respective task forces so they can perform. The Indiana Resource team member's job is to help the task forces function well, be strategic and intentional, make great choices and execute. Success does not come from excuses; it comes from being innovative, hard working and focused.

3. Team Member - Being a good resource team member involves many attributes:

- Being consistent, and maintain a strong communication link with the Site Coach and other team members;

- Paying attention when you have contact with the pilot community - share what you learn even if it is not core to your work and responsibilities;
- Read all communications follow directions, ask questions and get your work done on time and on budget.

Pilot Community Job Descriptions:

Identifying an initial set of leaders to serve as your community's HTC Steering Committee and choosing the Community Coordinator is an important step in moving forward with Phase 1 of the Indiana - HTC program.

STEERING COMMITTEE - In Phase 1 the Steering Committee plays a central role to the success of the HTC process. Steering Committee members are part of a temporary board of directors charged with guiding and overseeing the community assessment and strategy opportunity identification work of Phase 1. Steering Committee members will:

- Help identify and engage other community members in the HTC process;
- Provide strategic guidance including initial reactions to the assessment reports and information generated;
- Share your knowledge and insight with the Site Coach and Pillar Specialists;
- Identifies the individual to fill the role of Community Coordinator;
- Identify and procure the local resources needed to support the HTC initiative;
- Provide oversight and accountability for the Indiana - HTC initiative.

COMMUNITY COORDINATOR - The Community Coordinator plays a vital role in the Indiana - HTC program. The Community Coordinator is chosen by and reports to the Steering Committee and will generally devote 10 to 15% of their time to the Indiana - HTC Phase 1 process. The Community Coordinator has three primary job responsibilities:

1. Strategic Leader
2. Community Liaison with Indiana - HTC
3. Day-To-Day Coordinator

1. Strategic Leader - The Community Coordinator serves as the strategic leader for the community's local team engaged in the Indiana - HTC initiative. As strategic leader, the Community Coordinator plays a number of roles including:

- Assembling the local community pillar task forces working groups;
- Ensuring the Indiana - HTC process flows and moves at an appropriate pace;
- Identification of strategic opportunities, leverage points and catalytic activities;
- Be the primary contact for the Site Coach and Pillar Specialists.

2. Community Liaison - The Community Coordinator serves as the liaison for the Steering Committee and pilot community. As community liaison, the Community Coordinator plays a number of roles including:

- Clarifying expectations;
- Ensuring good communication;

- Flagging community issues with the Site Coach and Pillar Specialists;
 - Managing community quality control;
 - Serves as staff to the community's Steering Committee;
 - Tracking of all task forces and working groups.
3. Day-to-Day Coordinator - The Community Coordinator serves as the community's day-to-day coordinator. As the day-to-day coordinator, the Community Coordinator plays a number of roles including:
- Regular communication with the Steering Committee, the Site Coach and Pillar Specialists;
 - Development of community communication and documentation strategies;
 - Coordination of the Steering Committee and four pillar task forces and work groups;
 - Development and management of the operating budget;
 - Day-to-day oversight of the Indiana - HTC process elements including development of action plans, performance reports, and process deliverables.

COMMUNITY PILLAR TASK FORCE MEMBERS - Phase 1 of the Indiana - HTC program focuses on community assessment. It will be vital to the success of the Phase 1 to have community members fully engaged in the assessment task force activities. These task forces will be coordinated by a Pillar Specialist and will focus on four key pillars:

1. Entrepreneurship Pillar Task Force
2. Leadership Pillar Task Force
3. Youth Pillar Task Force
4. Charitable Giving Pillar Task Force

1. Entrepreneurship Pillar Task Force - The Entrepreneurship Pillar Task Force will concentrate their work in the areas of economic assessment, community capacity assessment and business development opportunities.
2. Leadership Pillar Task Force - The Leadership Pillar Task Force will concentrate their assessment work in the areas of inventorying of leadership programs, conducting key stakeholder interview to identify community leadership goals and making recommendations on leadership programs to fit community goals.
3. Youth Pillar Task Force - The Youth Pillar Task Force will conduct their assessment through use of teen surveys, engaging in focus group activities, the inventorying of existing youth programs and making recommendations regarding future youth opportunities.
4. Charitable Giving Pillar Task Force - The Charitable Giving Pillar Task Force will inventory current charitable giving initiatives, and provide recommendations on strategic grant making an endowment building opportunities.

